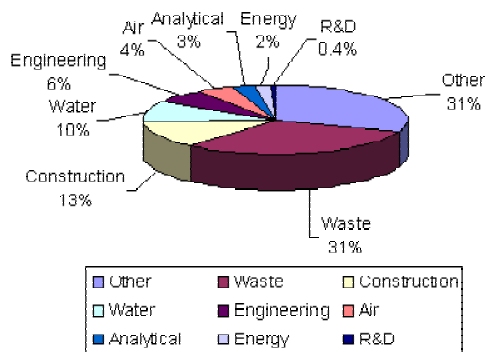




Air Soil Water Waste Environmental Industries

MARKET SEGMENTS



Source: Statistics Canada

MARKET OVERVIEW

- ▶ Canada's environmental industries include active sub-sectors in waste management, water and wastewater treatment, site remediation, engineering & consulting, waste and hazwaste management, and monitoring & analysis.
- ▶ The sector includes close to 6,000 companies, yielding close to \$30 billion in annual sales with exports in excess of \$1.3 billion. The domestic environmental market has been valued at over \$800 million, approximately 2% of the Canadian gross domestic product. This makes Canada a leading global environmental market with roughly 2.6% of global revenues (Government of Canada, 2002).
- ▶ Across Canada, the environment industry is broadly represented with 32% of firms located in Ontario, 33% in the Western Provinces, 23% in Quebec, 11% in Atlantic Canada and 1% in the Territories (Statistics Canada, 2002).
- ▶ Canada is noted for numerous environmental, industry and government organizations, most of which meet on a regular basis, offering ample opportunity for market insights, news of upcoming projects, and participation in high profile, specialty events, often at the regional level.

REGULATIONS

- ▶ As in most environmental markets, regulations drive the sector with each Canadian province having the principal mandate to enact and enforce the statutes. The Canadian Environmental Protection Act forms the basis for much of the legislation.
- ▶ Entering and staying close to the Canadian environmental market and the regulatory swings of the provincial and federal jurisdictions, will, in most cases, require some type of local presence. Although Canada has many national environmental standards and guidelines, they must still be enacted and enforced at the provincial level, leading to the need to stay abreast of regional opportunities.

MARKET OPPORTUNITIES

- ▶ The larger volume of opportunities is found in central Canada as a direct result of a concentration of industry and population. However, considerable regional activity is underway, since each province has a mandate to enact and enforce environmental regulations.
- ▶ As a mature market Canada presents opportunities in niche industries related to water and wastewater treatment, monitoring and analysis, water treatment infrastructure, water quality management, air pollution monitoring/control, solid waste management (including hazwaste), livestock pollution and e-waste recycling.
- ▶ Capitalizing on opportunities in the Canadian environmental market will nearly always require some type of local presence across Canada's regional markets: distributors, agents, strategic partnerships, MOUs, have all worked for U.S. companies.

THINK CANADA FIRST!

We hope that you find this information useful. If you would like further information, please contact Richard.Vinson@mail.doc.gov. Visit our website www.buyusa.gov/canada/en to discover other commercial opportunities in Canada.